Our Changing City



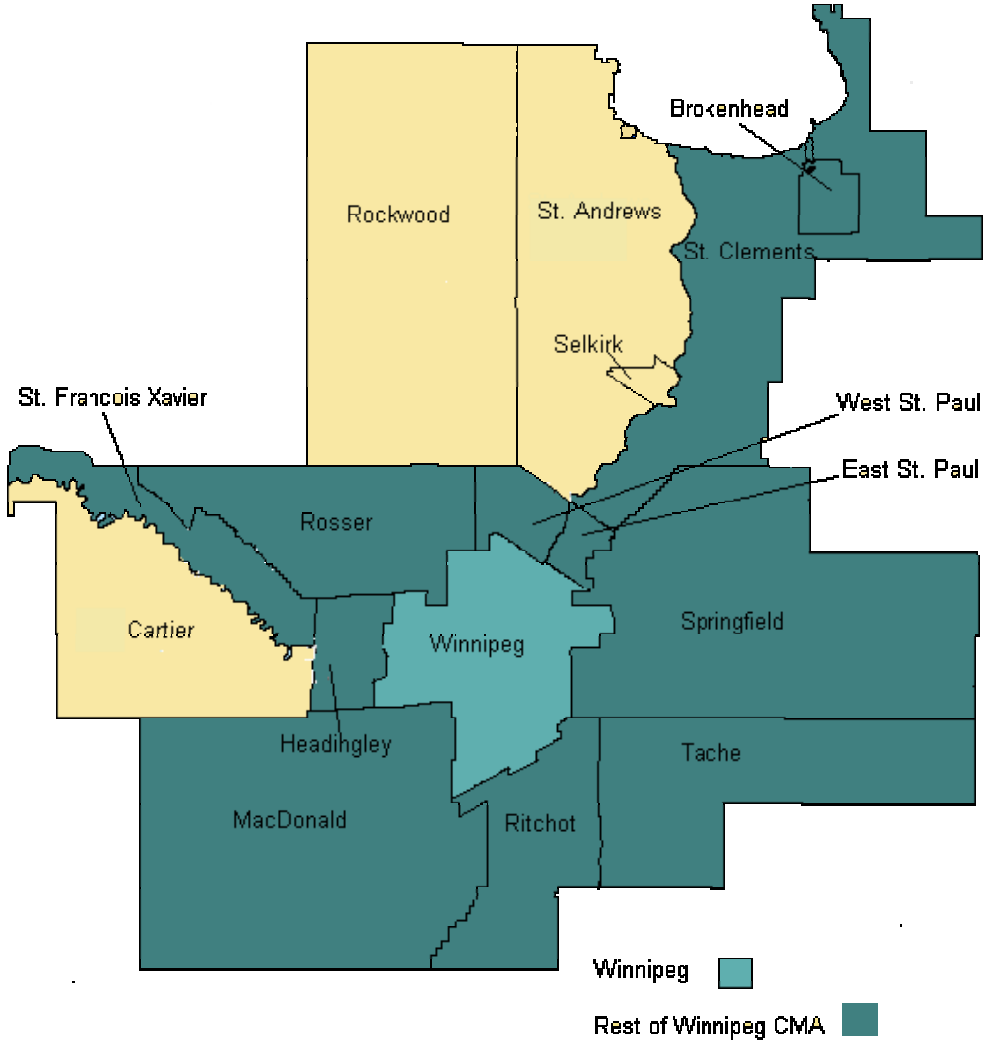
Presented to UDI and MPPI

June 23, 2010

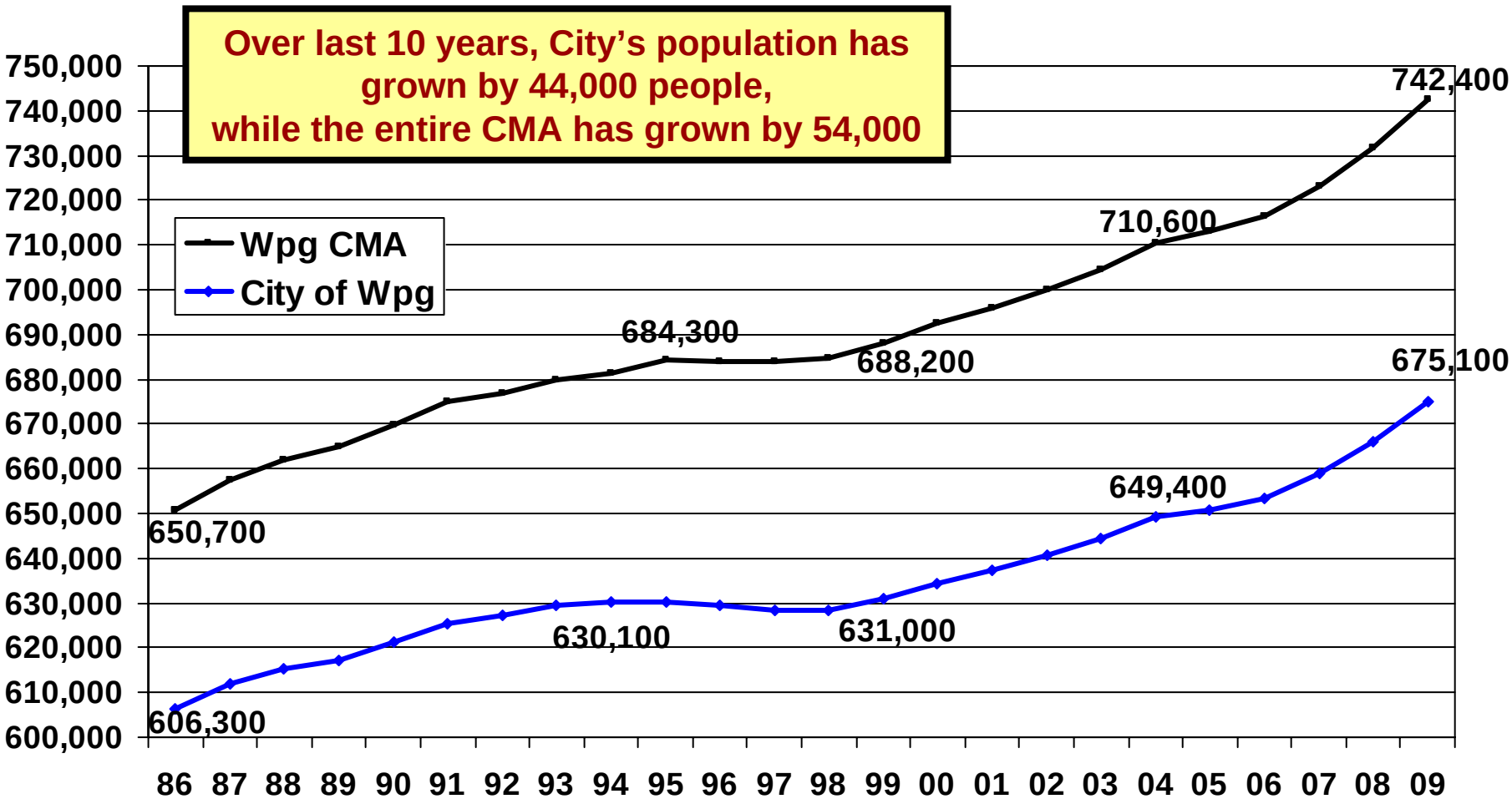
Capital Region and Winnipeg Census Metropolitan Area (CMA)

This map shows the area of the Capital Region. The areas in green signify the Census Metropolitan Area or CMA.

CMA's include the core city and any neighbouring municipalities where 50% or more of the labour force works in the core city.

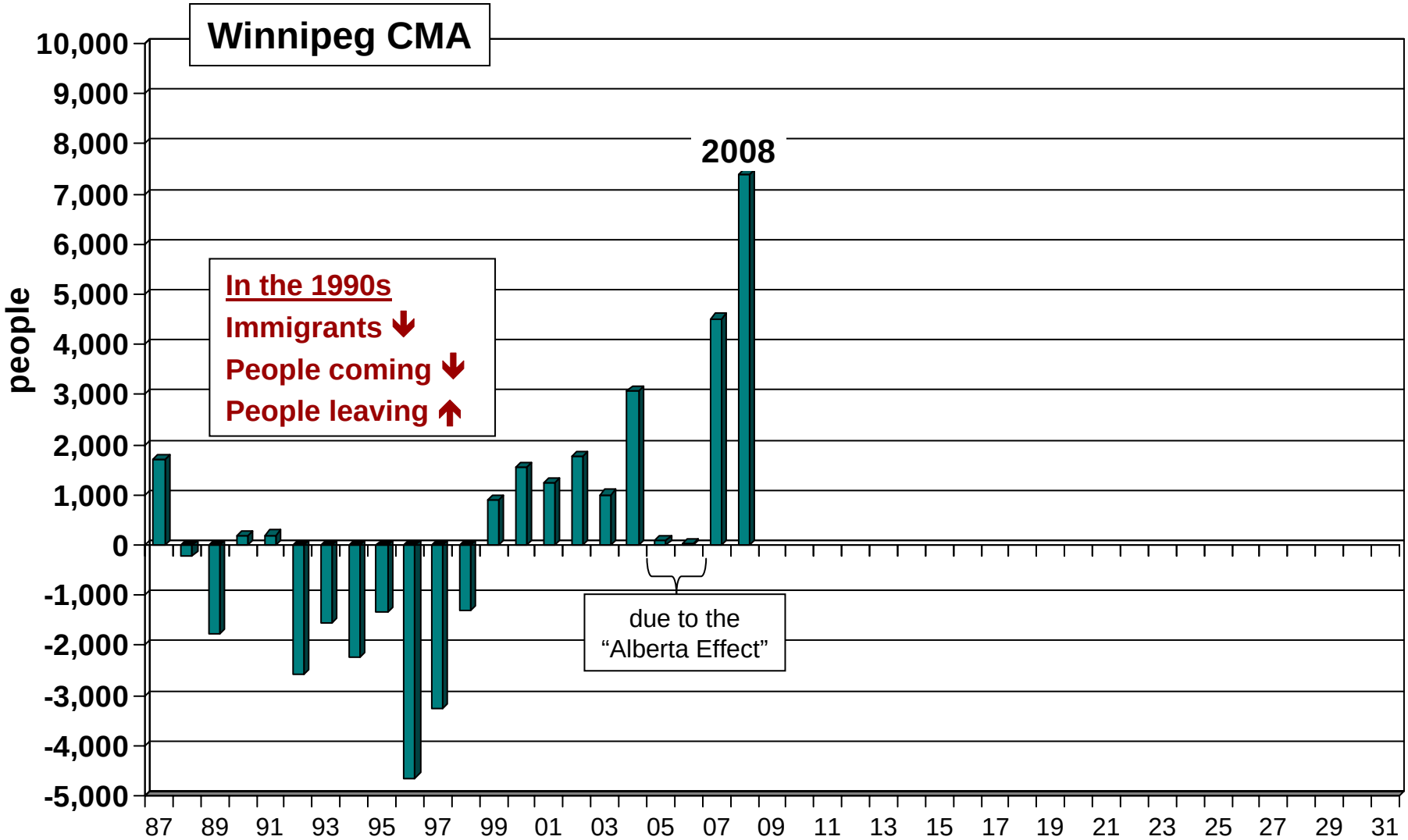


Population Estimates Reflect Renewed Growth



Source: Statistics Canada. CANSIM, February 2010
City of Winnipeg data calculated by subtracting Headingley census count from Census Division 11.

Main Source of Population Growth
Net Migration



Source: Conference Board of Canada, Winnipeg long-term forecast 2007

Where are the immigrants coming from

In 2008, the greatest number of people immigrating to Winnipeg were from the Philippines.

The picture is quite different when looking at the rest of Manitoba. By far, the majority of immigrants to other areas of the province are from Germany.

City Regions	2007	2008
Toronto	87,126	86,929
Montreal	38,699	38,884
Vancouver	32,947	37,375
Calgary	11,239	13,034
Winnipeg	8,471	8,114
Edmonton	6,541	7,507
Ottawa	5,788	6,285
% of Canada	81%	81%
Total Canada	236,754	247,243

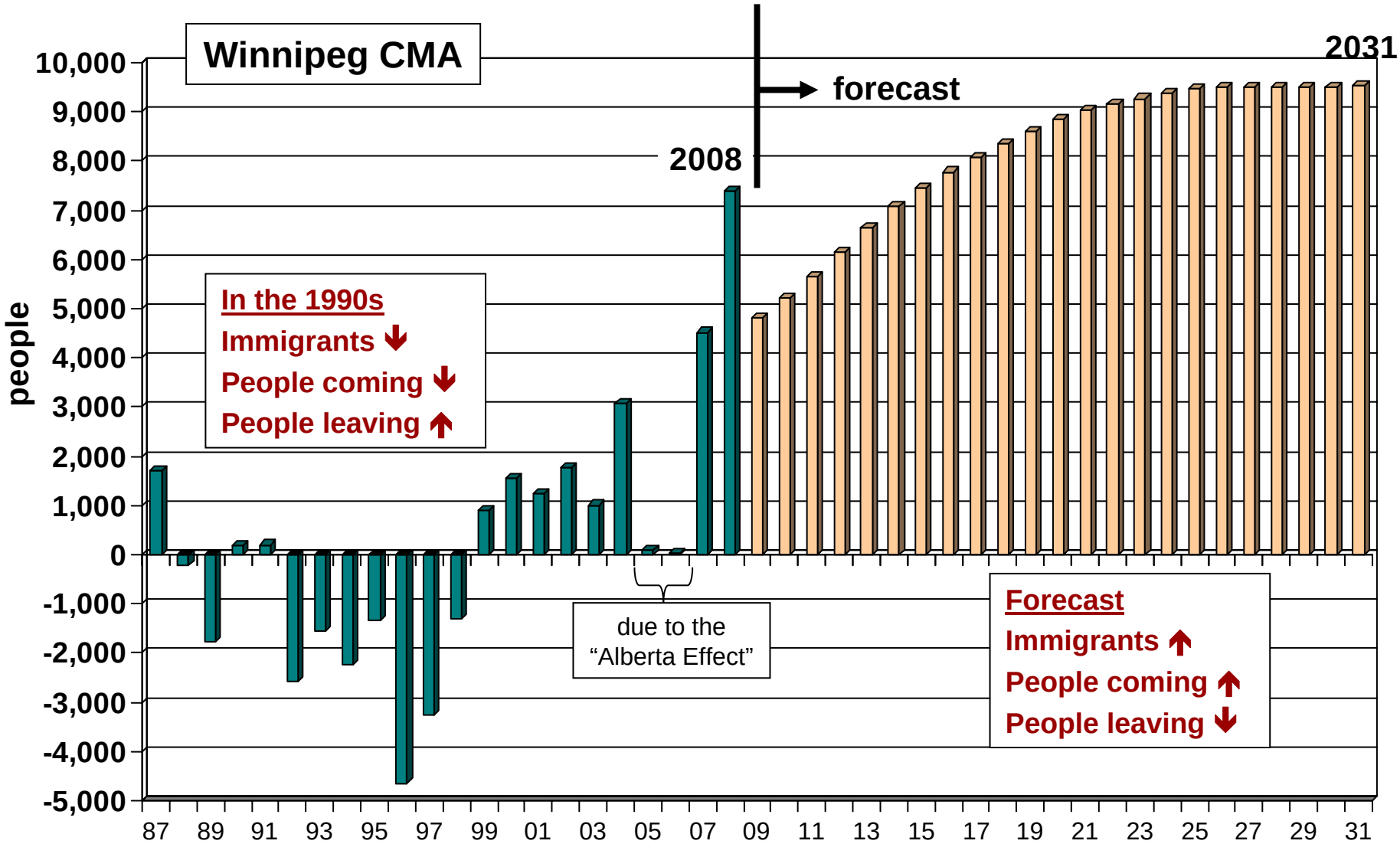
To Winnipeg	
Philippines	2,511
India	1,123
China	688
Israel	416
Korea	379
Ethiopia	238
Germany	194
U.S.A.	165
Nigeria	156
Sudan	140

To Rest of Manitoba	
Germany	1,604
El Salvador	342
China	223
Philippines	160
England	138
India	111
U.S.A.	72
Israel	33
Korea	29
Ethiopia	20

Source: Manitoba Immigration & Multiculturalism, Fall 2009

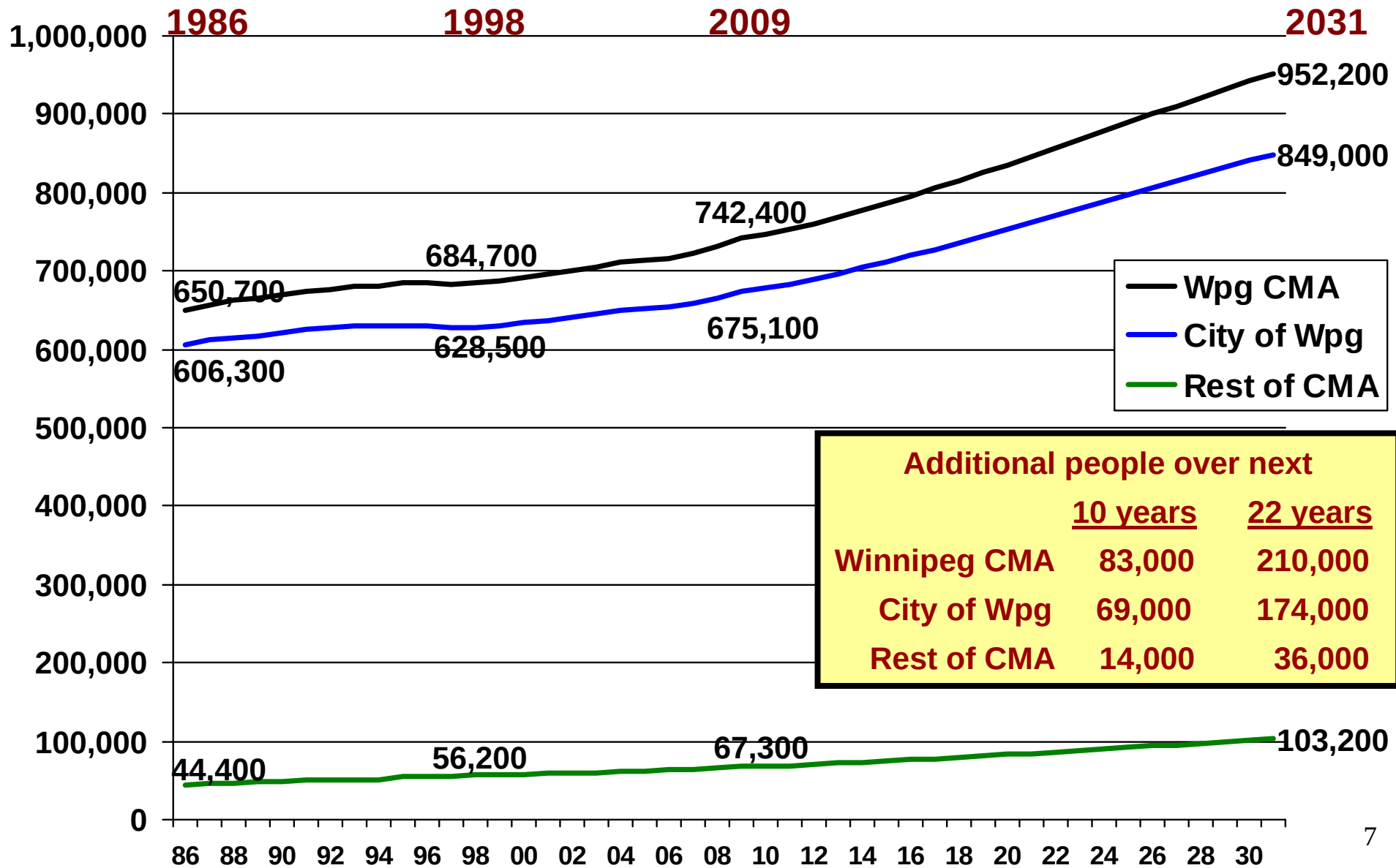
Source: Citizenship and Immigration Canada, September 2009

Main Source of Population Growth
Net Migration



Source: Conference Board of Canada, Winnipeg long-term forecast 2007

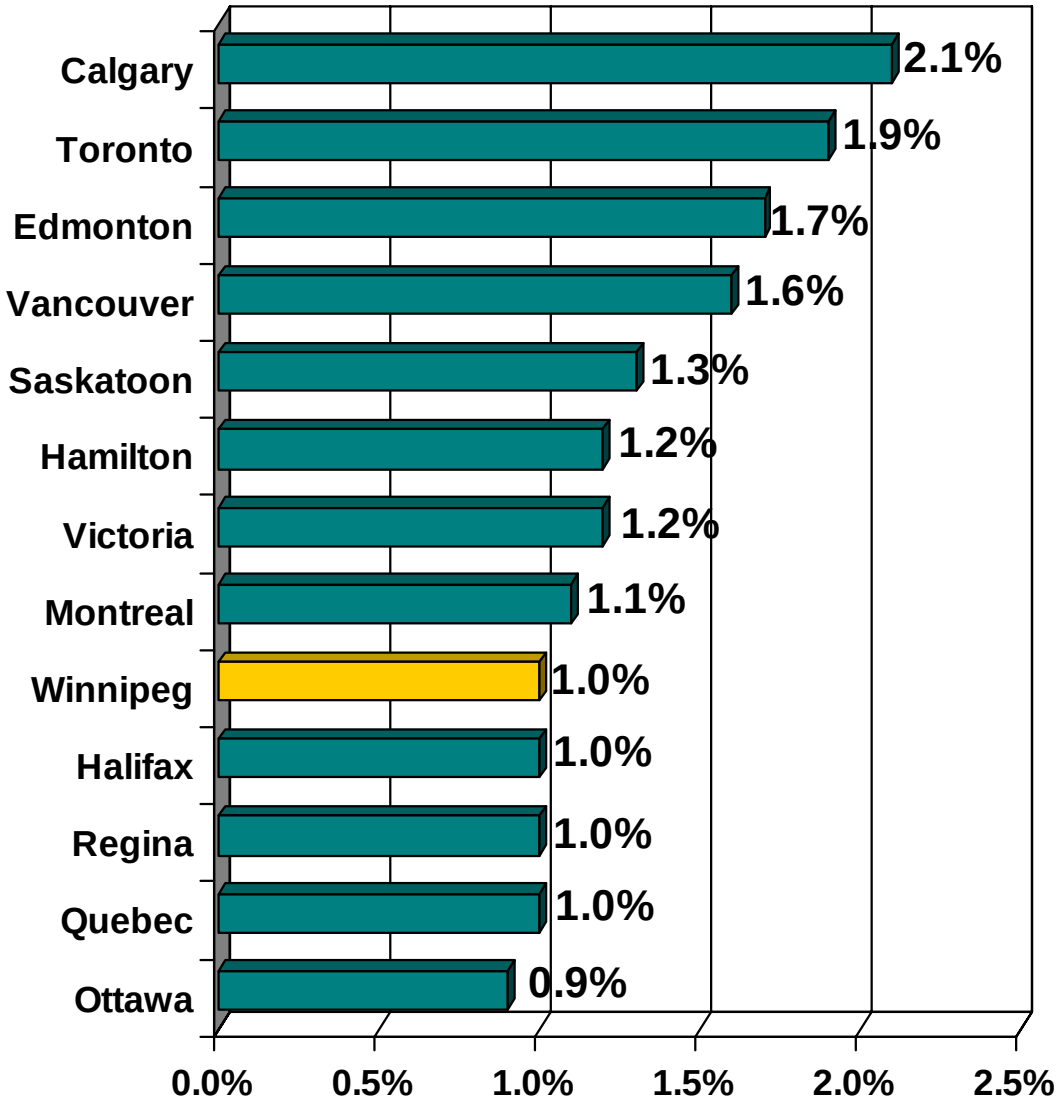
Significant Growth Forecasted
(adjusted to 2008 base)



Additional people over next	10 years	22 years
Winnipeg CMA	83,000	210,000
City of Wpg	69,000	174,000
Rest of CMA	14,000	36,000

Population Growth Rates in other Cities

Average annual growth rate of next 5 years



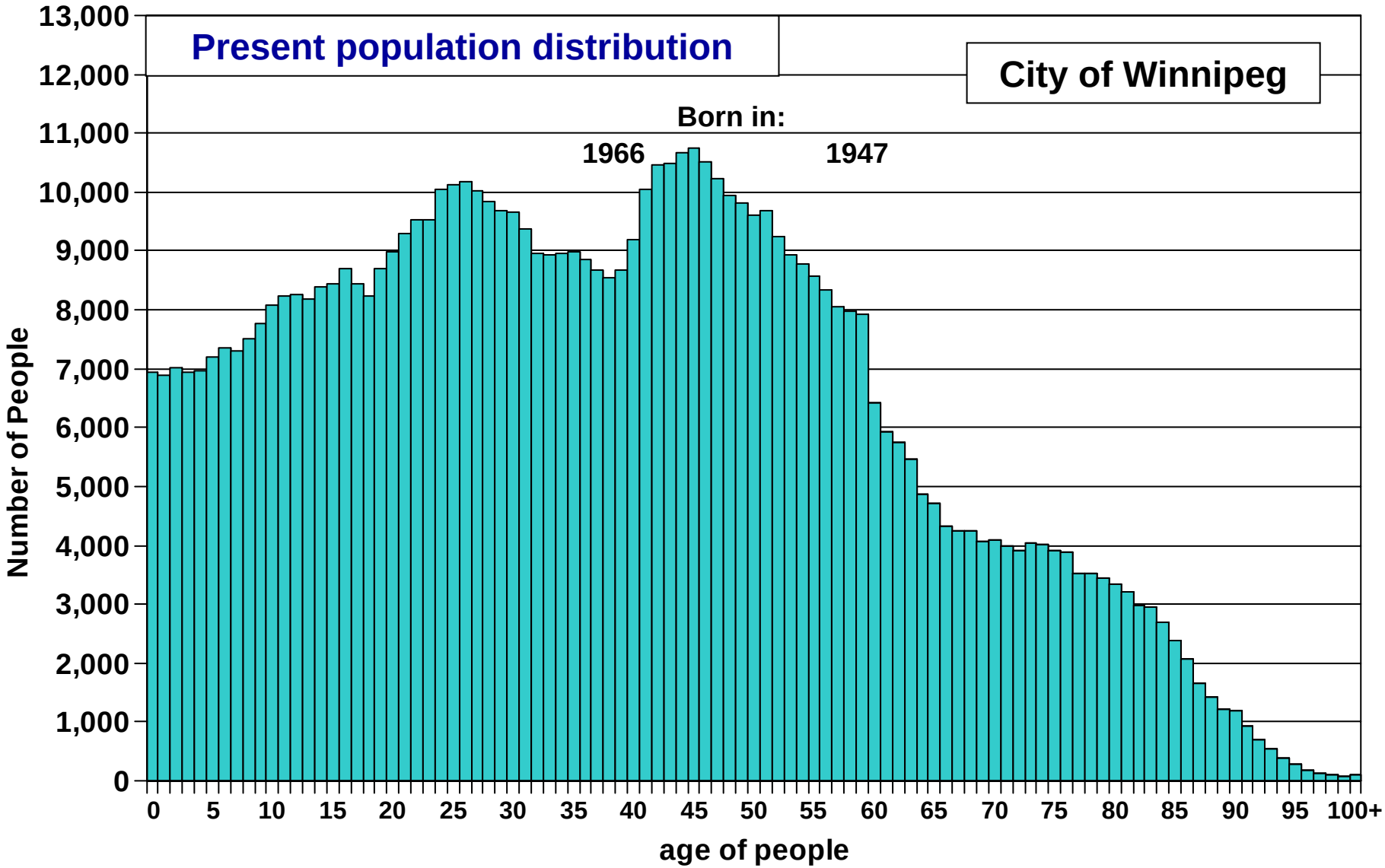
Although Winnipeg's population growth rate has increased, we are still experiencing modest growth relative to other cities.

To keep it in perspective, the yearly population growth for the Toronto region (CMA) is presently about 110,000 people per year.

Winnipeg's 22 year growth equates to 2 years of growth for Toronto.

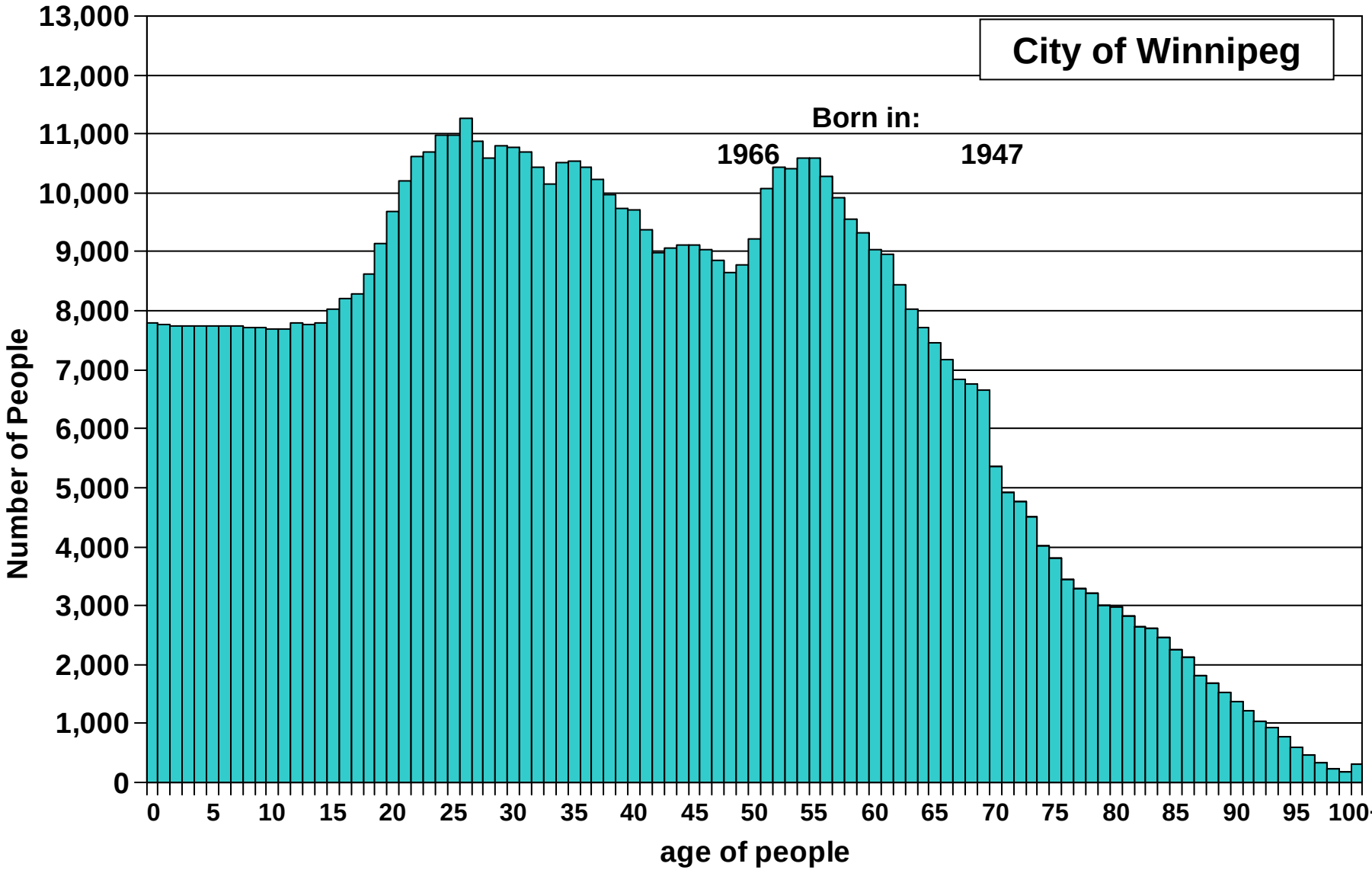
Source: Conference Board of Canada, Metropolitan Outlook Data, March 2010

Population by Single Age For 2006



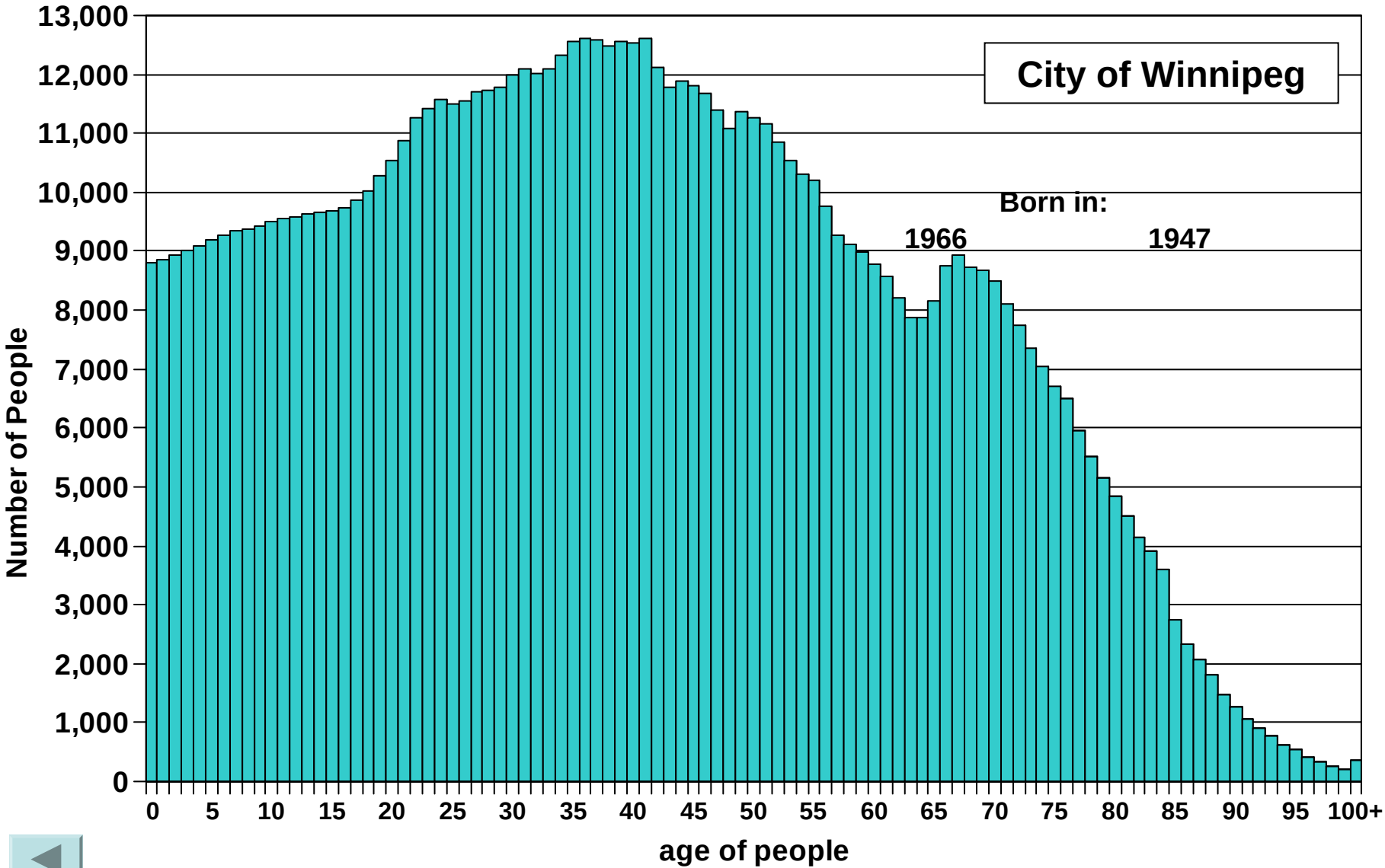
Source: Conference Board of Canada, Winnipeg long-term forecast 2007

Population by Single Age For 2016



Source: Conference Board of Canada, Winnipeg long-term forecast 2007

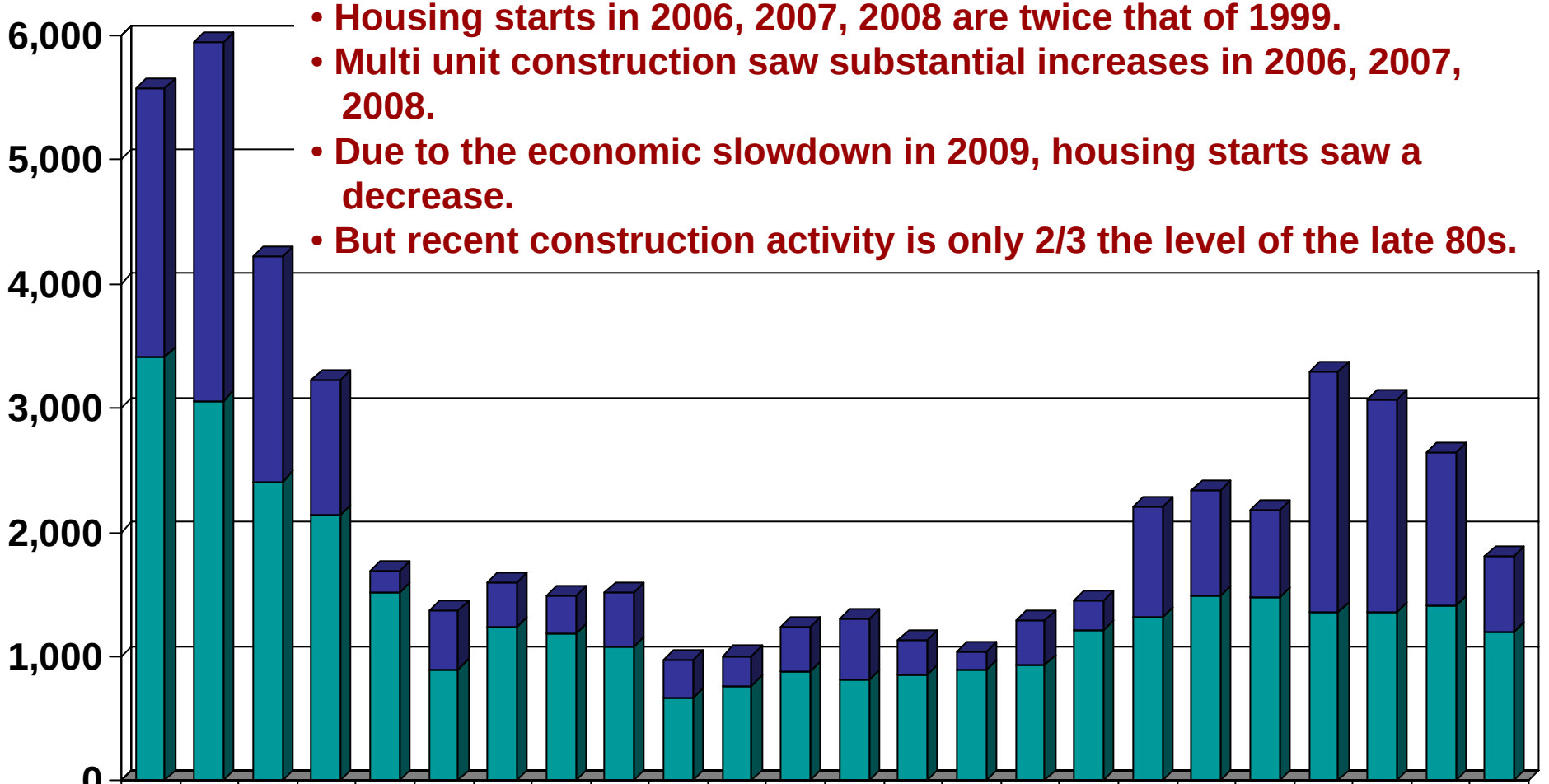
Population by Single Age For 2031



Source: Conference Board of Canada, Winnipeg long-term forecast 2007

Construction of Dwelling Units in Winnipeg

- Housing starts in 2006, 2007, 2008 are twice that of 1999.
- Multi unit construction saw substantial increases in 2006, 2007, 2008.
- Due to the economic slowdown in 2009, housing starts saw a decrease.
- But recent construction activity is only 2/3 the level of the late 80s.



	86	87	88	89	90	91	92	93	94	95	96	97	98	99	00	01	02	03	04	05	06	07	08	09
Multi	2,156	2,883	1,804	1,083	173	470	357	305	433	309	240	354	493	277	146	353	239	889	846	703	1,931	1,710	1,237	617
Single	3,412	3,059	2,410	2,144	1,519	899	1,241	1,181	1,084	663	767	883	811	850	898	937	1,212	1,319	1,489	1,474	1,360	1,357	1,409	1,194

Source: City of Winnipeg, Planning, Property and Development Dept.

Housing Starts – How is 2010 looking?

In 2010, the housing starts have increased following the 2009 slowdown.

Single housing starts in the City are actually the highest over the 5 year period, Jan to May.

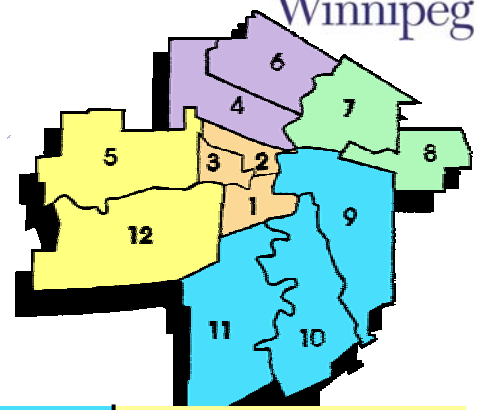
Overall similar to 2006

Winnipeg Housing Starts, Jan to May

		2006	2007	2008	2008	2010
Singles	CMA	684	722	742	540	705
	City	575	552	571	442	603
	Rest	109	170	171	98	102
Multiples	CMA	346	676	491	109	337
	City	346	634	489	105	335
	Rest	-	42	2	4	2
Total	CMA	1,030	1,398	1,233	649	1,042
	City	921	1,186	1,060	547	938
	Rest	109	212	173	102	104

Source: CMHC – Press Releases, Housing Now

Winnipeg Housing Starts by Area, 2000 - 2009



The majority of single housing starts are in the South; with the majority of the multi housing starts in the North East.

Multiple
Single

Central | North | North East | South | West

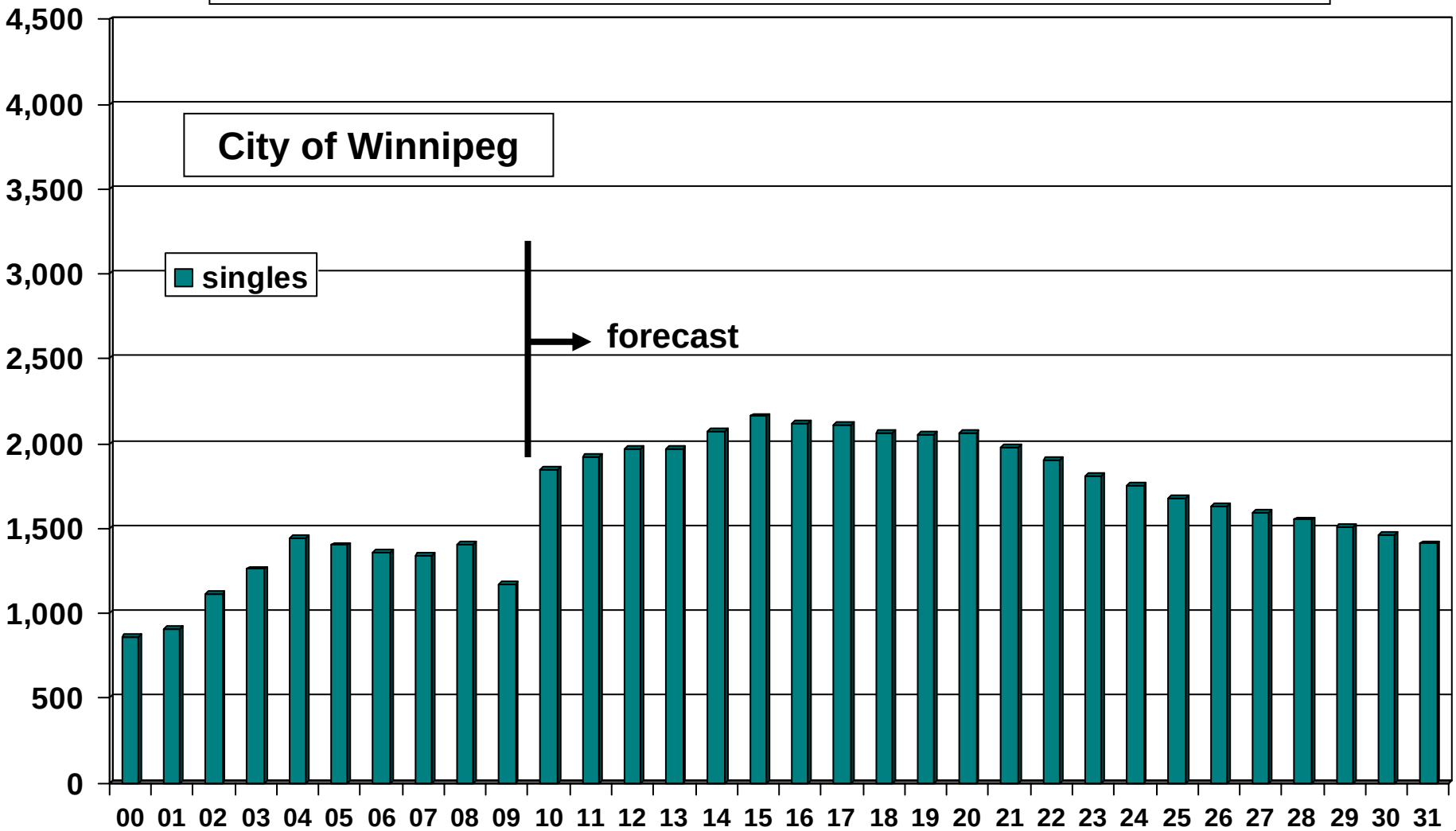
1,500
1,250
1,000
750
500
250
0

05 06 07 08 09 | 05 06 07 08 09 | 05 06 07 08 09 | 05 06 07 08 09 | 05 06 07 08 09

Source: CMHC – Residential Construction Digest, December 2009

Significant Change in Housing Demand

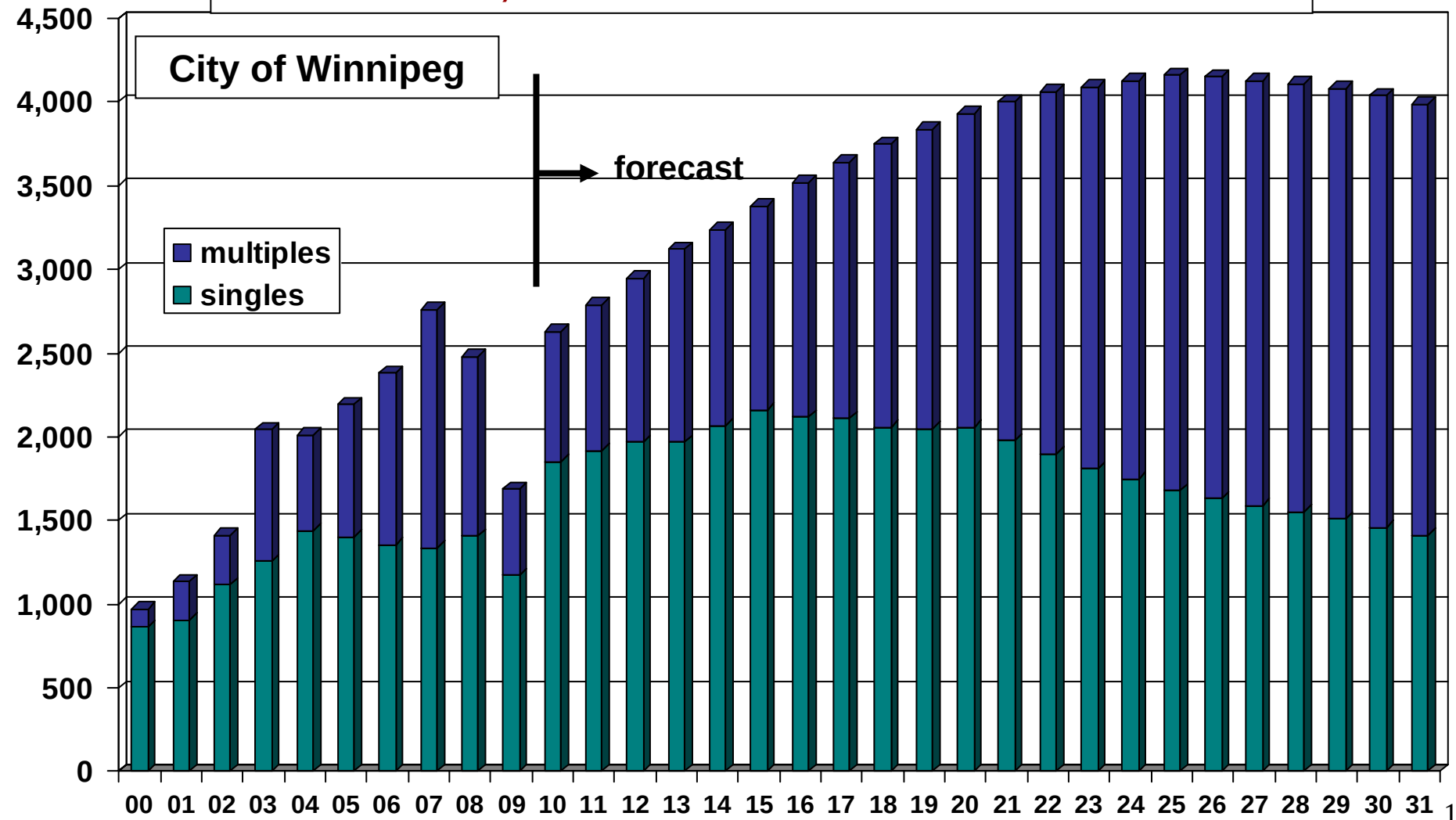
Cumulatively, from 2010 to 2031, the City of Winnipeg will need approximately 41,000 additional single dwelling units



Source: Conference Board of Canada, Winnipeg long-term forecast 2007

Significant Change in Housing Demand

Cumulatively, from 2010 to 2031, the City of Winnipeg will need approximately 41,000 additional multi-dwelling units => a total of 82,000 additional units.

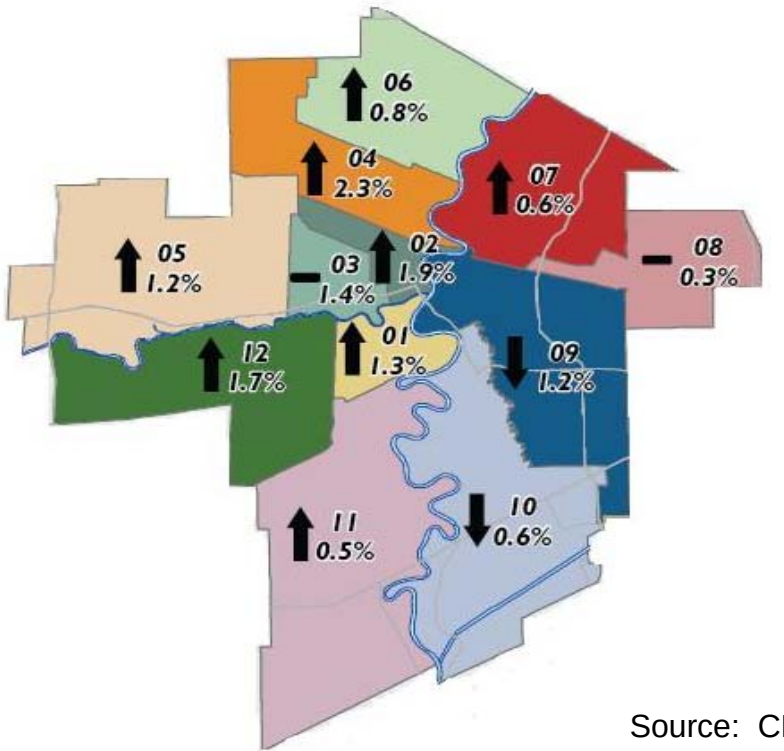


Source: Conference Board of Canada, Winnipeg long-term forecast 2007

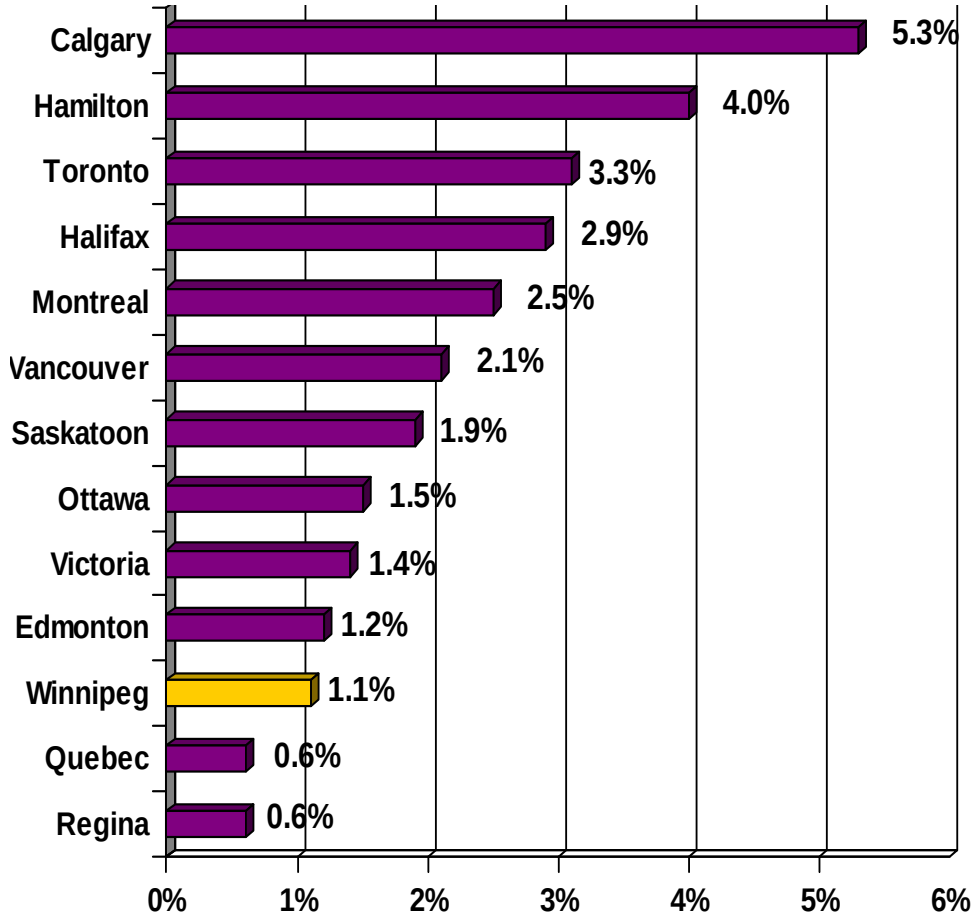
Apartment Vacancy Rates

The overall vacancy rate for Winnipeg is 1.1%

The lowest vacancy rate occurs in the areas of Transcona at 0.3% and in Fort Garry at 0.5%; the highest rate is in the Lord Selkirk area with a vacancy rate of 2.3%.



2009 Apartment Vacancy Rates In Other Cities



Source: CMHC Rental Market Report, Fall 2009

Housing Prices – CMHC Forecast

New

Year	Price	Percent Increase
2000	$175,500	110%
2009	$ 369,300	
2010F	$ 395,000	7%
2011F	$ 415,000	5%

Re-sale

Year	Price	Percent Increase
2000	$89,100	133%
2009	$207,300	
2010F	$222,000	7%
2011F	$230,000	4%

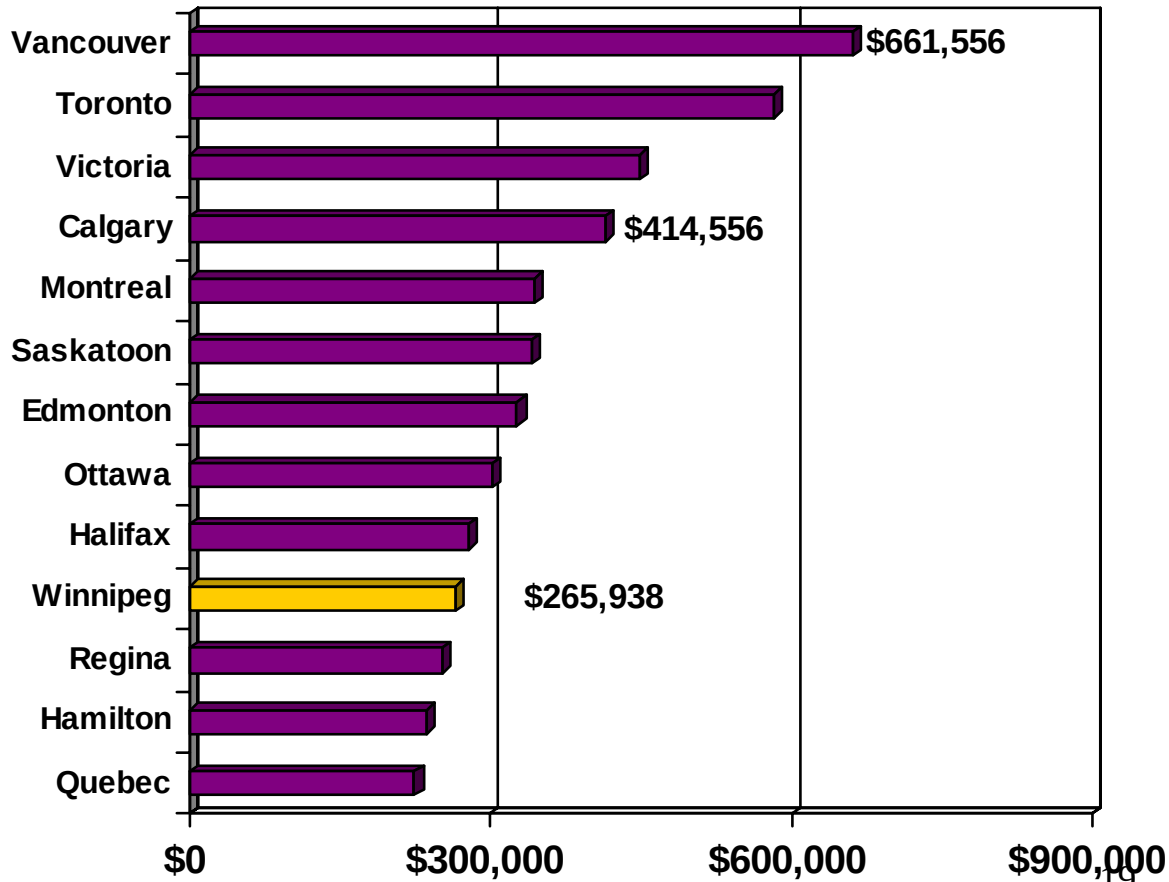
Source: CMHC Housing Market Outlook

2009 Average Resale Home Price Comparison – standard two-storey house

Even though Winnipeg has experienced a significant increases in the average price of a home, when compared to other larger Canadian cities Winnipeg continues to be a city with one of the lowest housing prices in Canada.

A two-storey home in the region of Vancouver would cost $661,556 or almost 150% more than in Winnipeg.

In Calgary: $414,556, which is 56% more than in Winnipeg.

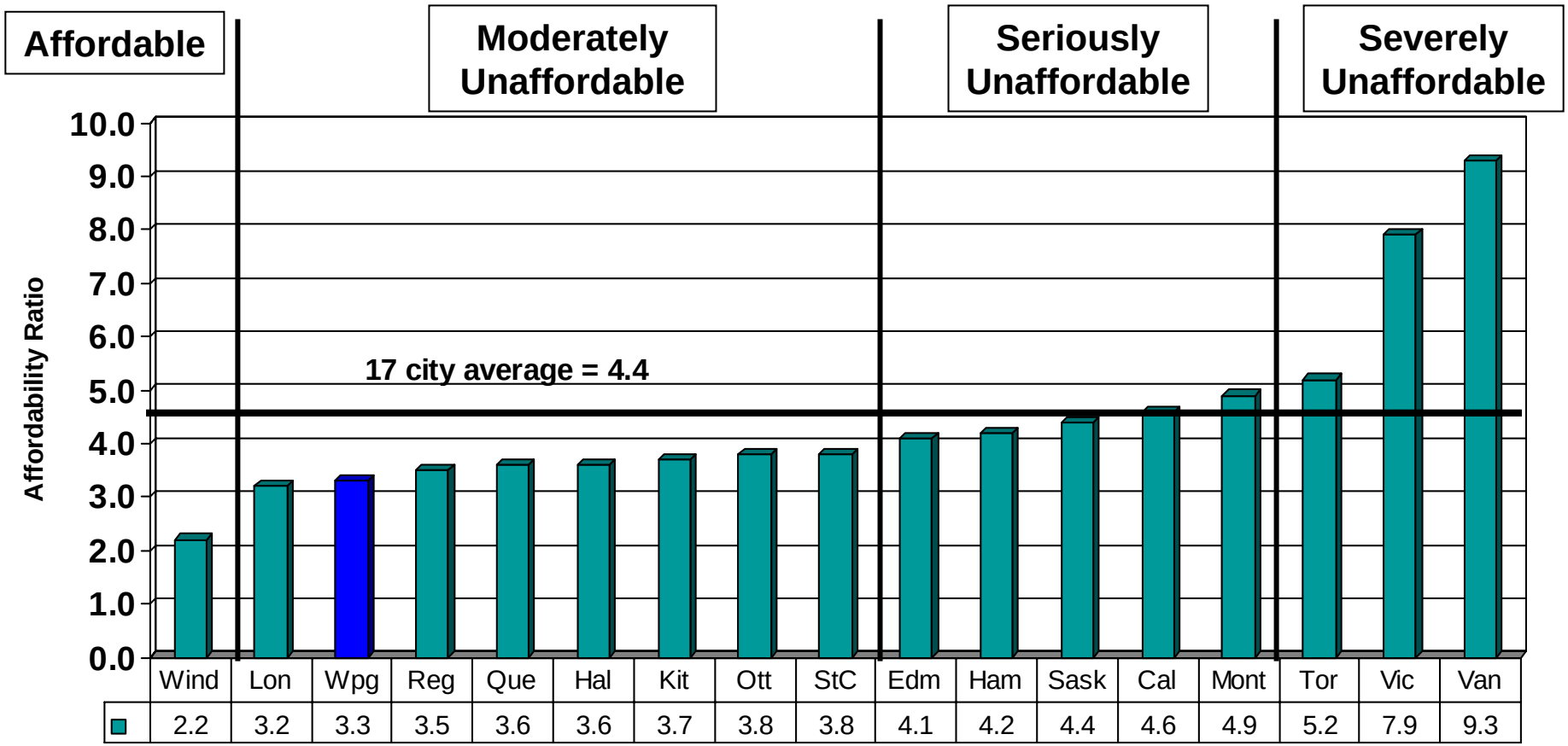


Source: Royal LePage Survey Data, 2009, third quarter

Housing Affordability

Median House Price / Median Household Income

Even with significant house prices increases over the last several years, Winnipeg continues to have affordable house prices relative to other Canadian cities.

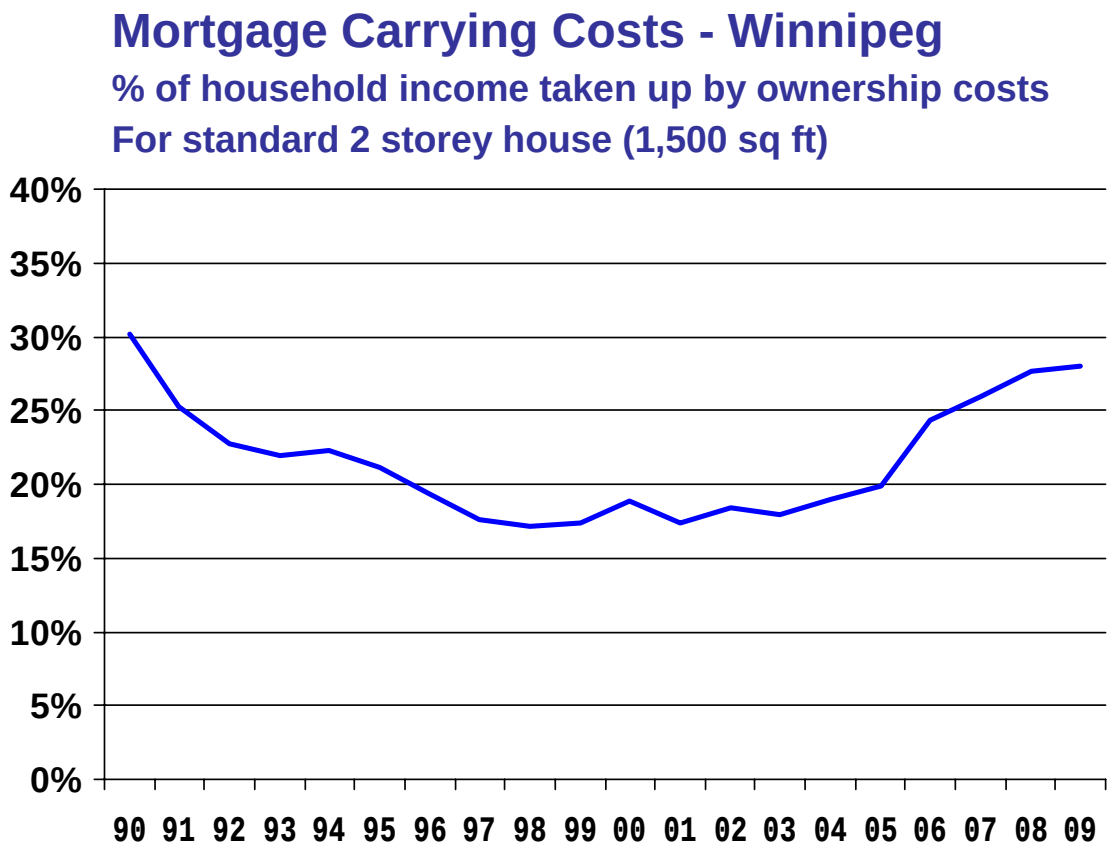


Source: Demographia, 6th International Housing Affordability Survey: 2010 (data for 3rd quarter 2009).
Used 17 largest Canadian CMA cities (Regina and larger, 200,000 plus population).
Affordability categories established by Demographia, http://www.demographia.com/

Mortgage Carrying Cost - Winnipeg

Housing affordability improved during the 1990s as a result of flat house prices during that time. Mortgage carrying costs decreased from 30% of household income to less than 20%.

Over the last few years, this trend has reversed. In 2009, the average household is spending 28% of their household income on mortgage costs.



Source: Royal Bank of Canada, Housing Affordability

Winnipeg's Annual Economic Growth

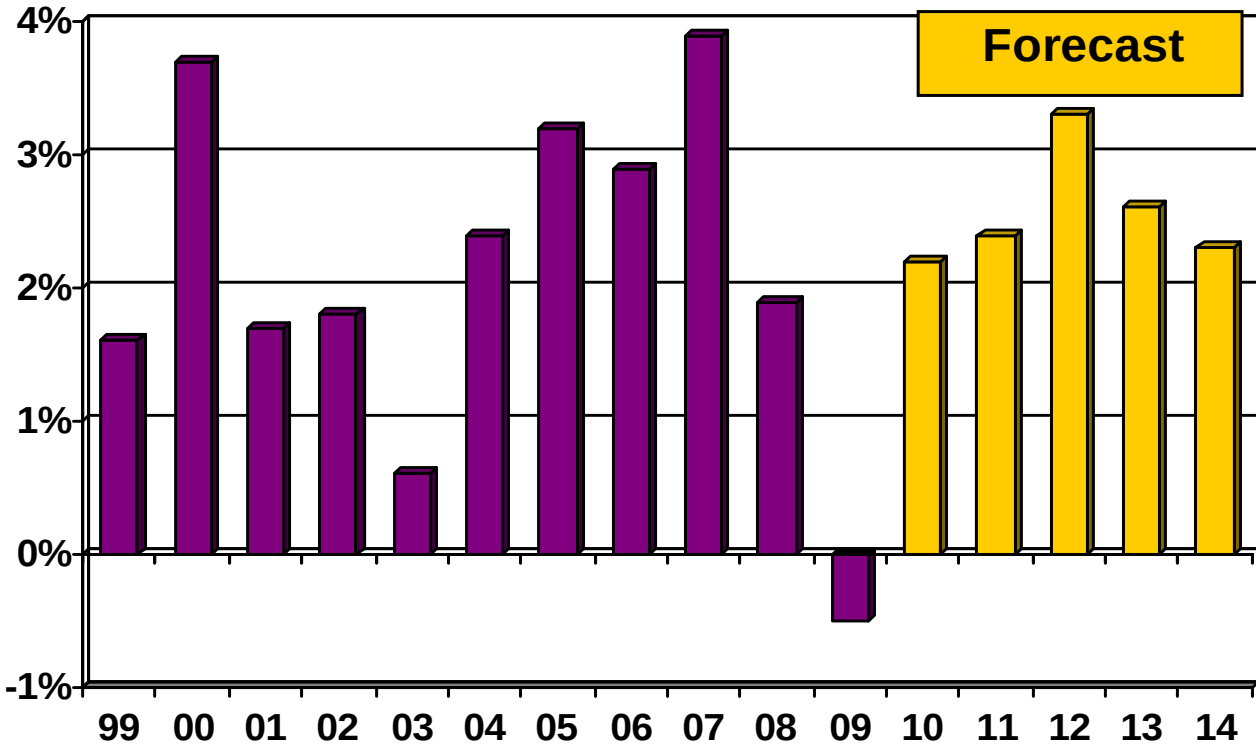
Forecast:

Almost 22,000 jobs will be created over the next 5 years.

85% of new jobs will be in the service sector.

14% will be in manufacturing and construction.

Real Gross Domestic Product (GDP), annual % change in constant 2002 dollars

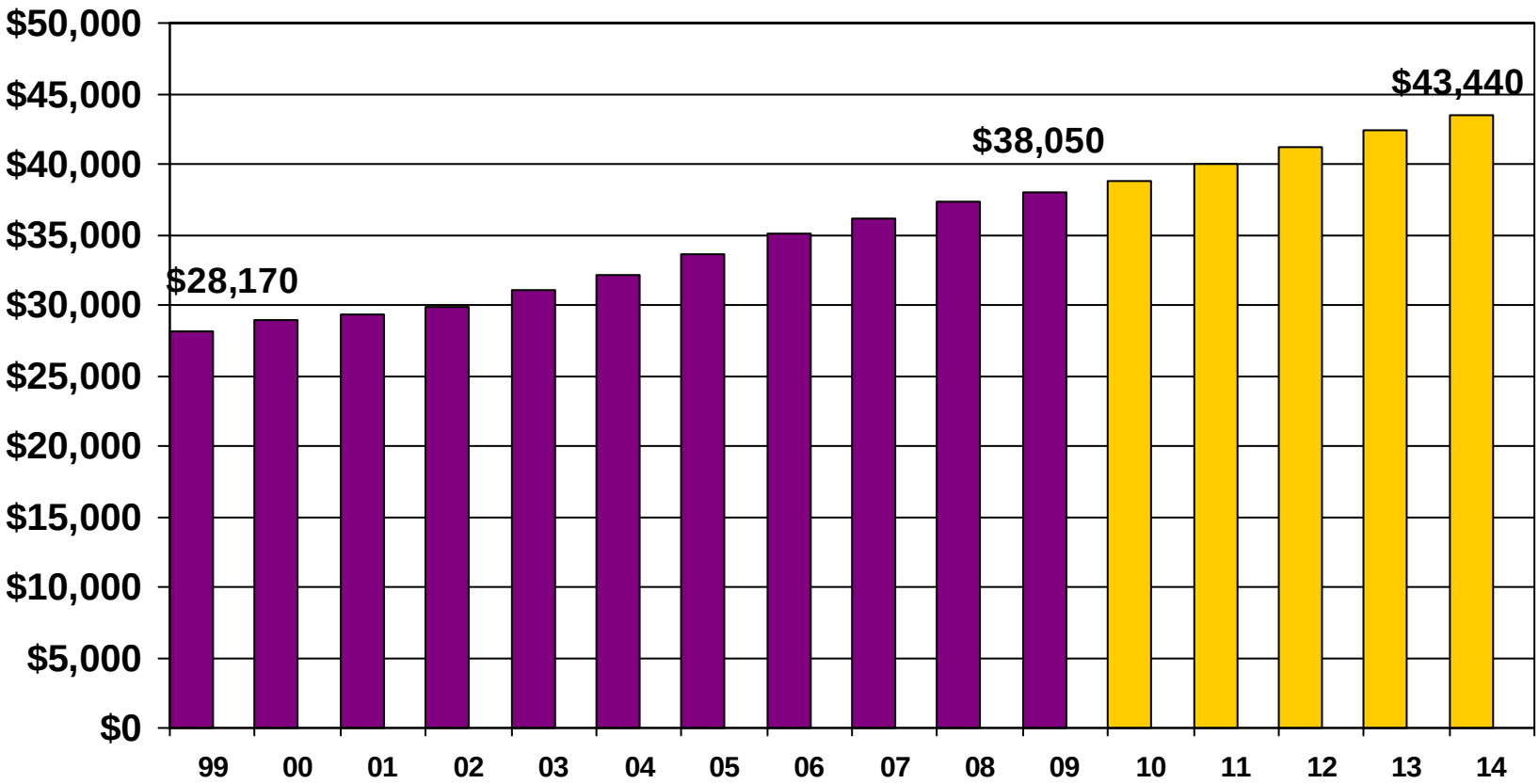


Source: Conference Board of Canada, Metropolitan Outlook Data, March 2010

Average Salary Trend - Winnipeg

Winnipeg's average salary increased 35% in the last 10 years.

During the same period of time inflation was 22%



Source: Conference Board of Canada, Metropolitan Outlook Data, March 2010

Wage Comparisons

Manitoba's median wage is the lowest among our competing provinces.

The provinces which compete with Manitoba for labour, all have higher wages than Manitoba – from 7% higher in Saskatchewan to 23% higher in Alberta..

Thus wages in Canada are on average, 12% higher than in Winnipeg which is the same as a decade ago. Yet, Manitoba wages have not kept up with increases in Alberta and Saskatchewan, but at the same time Manitoba wages has gained on Ontario's and BC wages.

% Different from Manitoba's Median Hourly Wage

	1999	2009
Canada	12%	12%
Ontario	19%	16%
Saskatchewan	0%	7%
Alberta	7%	23%
BC	29%	17%

Source: Statistics Canada, derived from CANSIM data

Salary Comparisons - Municipal Govts

When compared to other Canadian city governments, Winnipeg has the lowest average wage.

The average government wage of these other cities is 17% more than Winnipeg's wage.

When we look at the number of employees per 1,000 people (population), Winnipeg ranks second lowest with 12.2 staff.

2008	Average Salary & Benefits	Employees per 1,000 citizens
Toronto	$84,500	14.8
Calgary	$83,200	13.5
Hamilton	$81,600	10.6
Edmonton	$78,800	15.3
Ottawa	$76,200	13.6
Regina	$74,000	13.8
Saskatoon	$67,200	13.8
Winnipeg	$66,800	12.2

2008 annual report data adjusted to match similar basked of services.
NOTE: Ontario cities data adjusted to remove ambulance, social services, public health and housing; For Winnipeg, Edmonton and Calgary ambulance has been removed.

Labour Shortage

"Migration will become an increasingly important factor for population growth, and Winnipeg's ability to attract new migrants will become an important determinant of its future economic potential."

Conference Board of Canada, Winnipeg long-term forecast, 2007

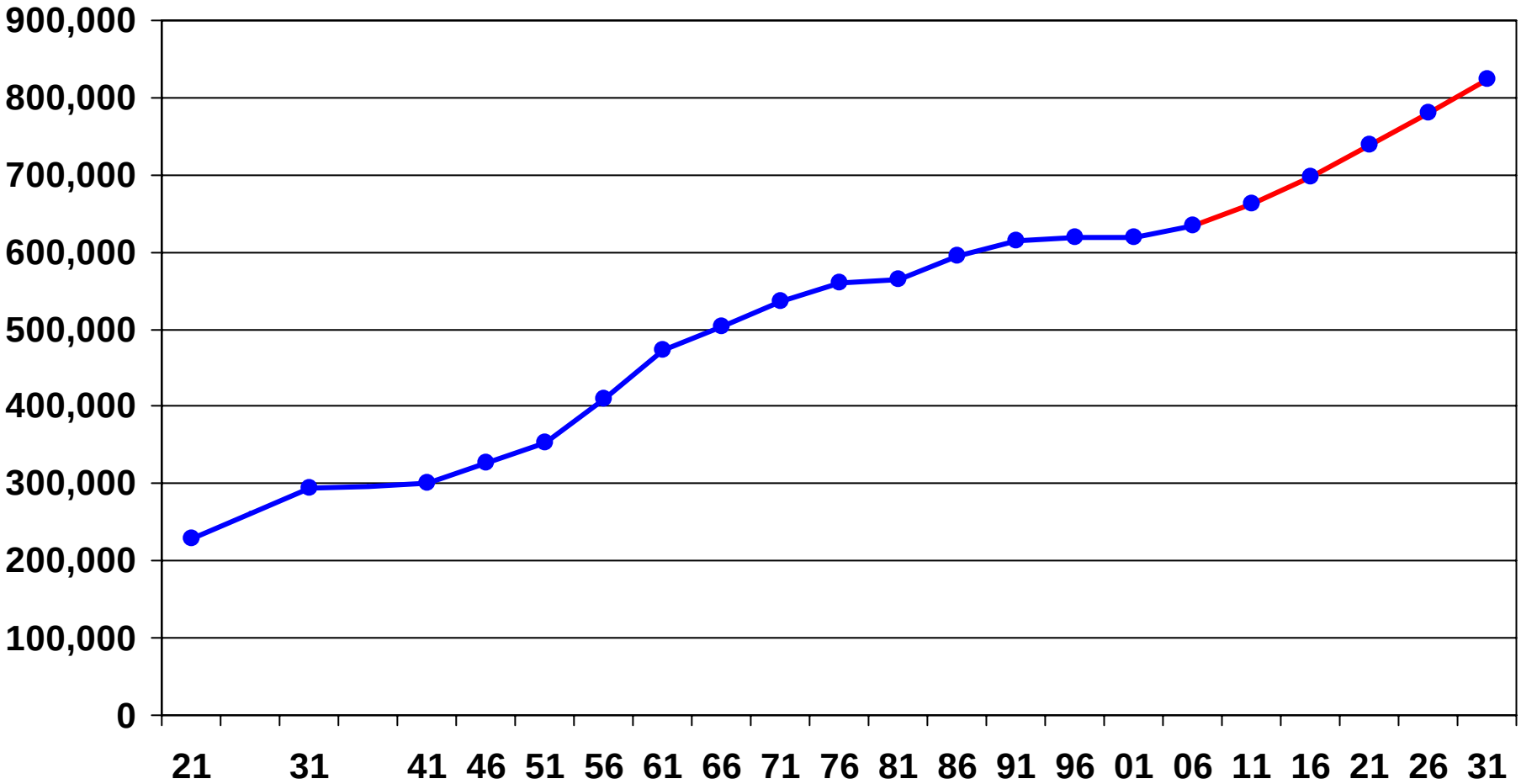
- **In the 1980s and 1990s governments focused efforts in reducing high unemployment through job creation initiatives.**
- **Presently, and in future, with low unemployment and significant labour shortages, the circumstances are very different. Governments and employers are turning their efforts and strategies towards employee retention and attraction. An example of this is the Provincial Nominee Program and its success in increasing immigration.**
- **Companies will set up and expand where there is labour.**

Questions?



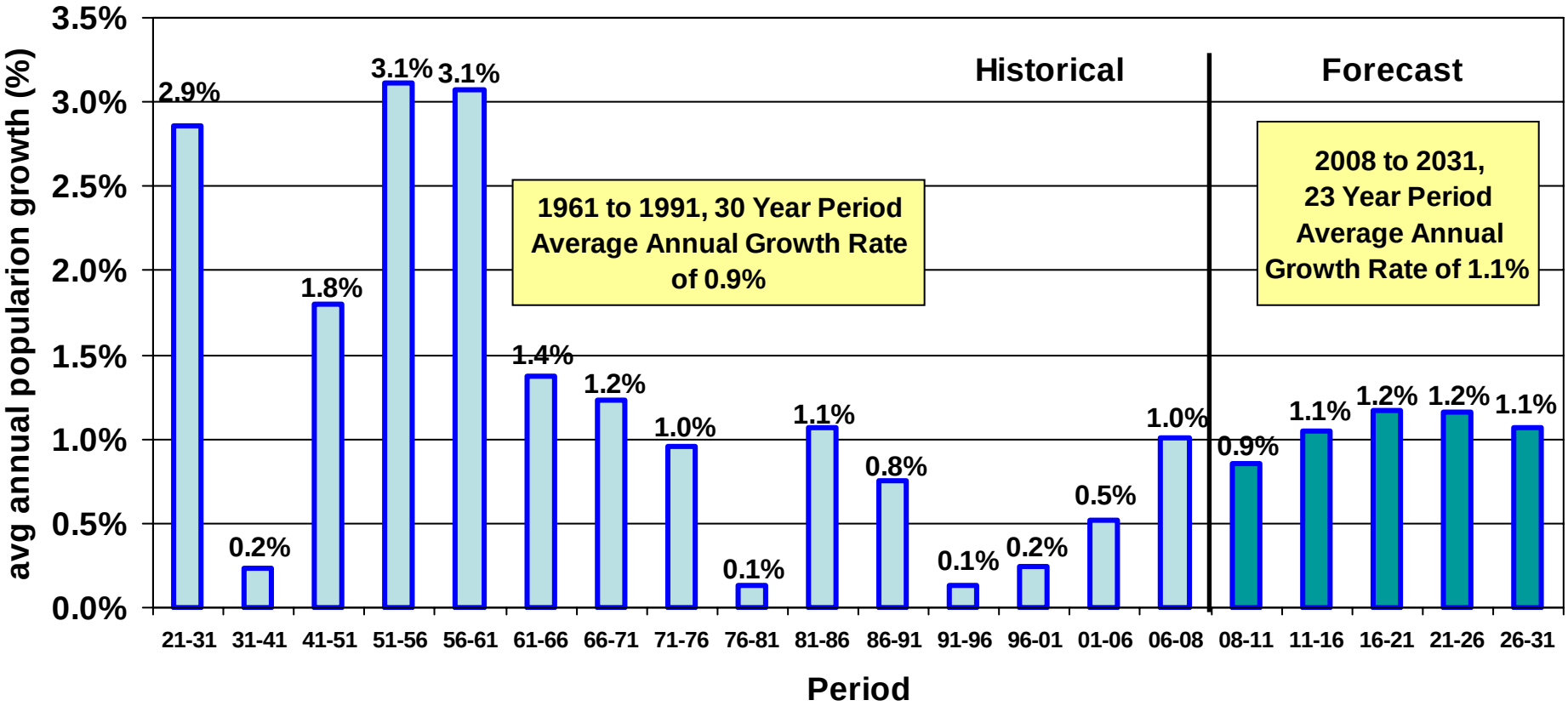
Georges Chartier
City Economist, City of Winnipeg

Census Population of Winnipeg



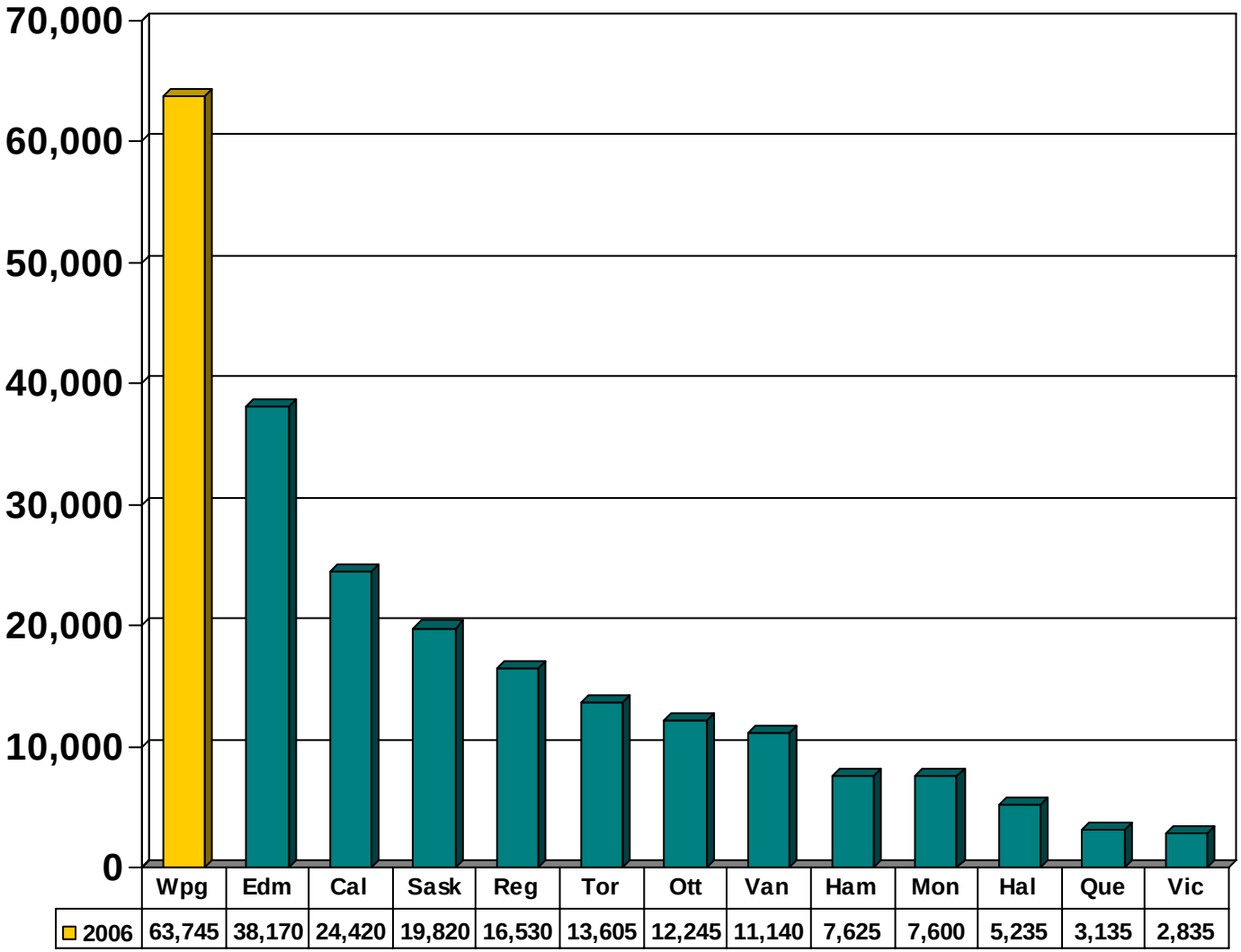
Source: For years 1921 to 1986, Province of Manitoba's Capital Region website: Census Populations of Census Division 11 (Present geography of Winnipeg plus Headingley). http://www.gov.mb.ca/ia/capreg/linkpage.html
1991 to 2031 City of Winnipeg

Winnipeg's Population Growth Rates
Average Annual Growth Rates (1920 to 2030)



Source: for years 1921 to 1991: Province of Manitoba's Capital Region website: Census Populations of Census Division 11 (Present geography of Winnipeg plus Headingley). http://www.gov.mb.ca/ia/capreg/linkpage.html
For years 1991 to 2008, Statistics Canada, annual population estimates
For years 2008 to 2026, modified Conference Board of Canada, 2007 Population Forecast for Winnipeg CMA, City of Winnipeg derived data

Number of Aboriginal Persons in Cities – 2006 (municipalities)

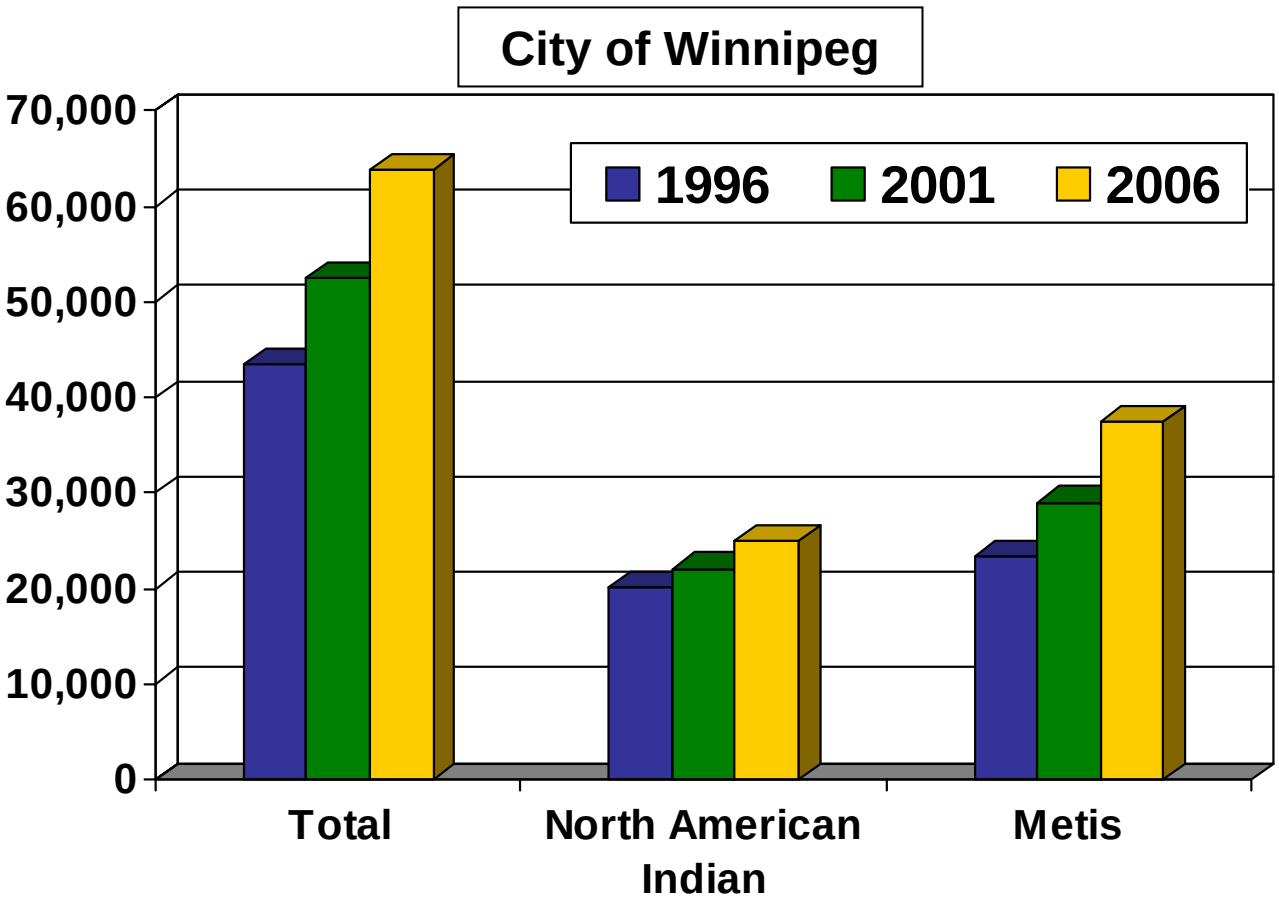


	Wpg	Edm	Cal	Sask	Reg	Tor	Ott	Van	Ham	Mon	Hal	Que	Vic
2006	63,745	38,170	24,420	19,820	16,530	13,605	12,245	11,140	7,625	7,600	5,235	3,135	2,835

Of major cities in Canada Winnipeg has the largest Aboriginal population.

Source: Statistics Canada, 2006 Census, Aboriginal persons based on identity

North American Indian and Métis 1996/2001/2006 Census Comparison



In Winnipeg (2006)

- **39% of Aboriginal Persons declared themselves as North American Indians.**
- **59% of Aboriginal Persons declared themselves as Métis.**

"It has been estimated that approximately 50% of the growth in the Aboriginal community between 1996 and 2001 was due to ethnic mobility." Manitoba Bureau of Statistics, June 2007

Source: Statistics Canada, 2006 Census, Aboriginal persons based on identity